

## **Electronic Personnel Action Forms (EPAF) for**

### **Job Assignments Category (JB\_)**

#### **Topics Include:**

- 1. How to Set Up a Proxy (NTRPROX)**
- 2. How to set up Automatic Electronic Approval Routing (NTRROUT)**
- 3. Electronic Approval Summary Screen (NOAAPSM)**
- 4. Electronic Approvals for Job Assignments (JB\_): An Overview, JB\_ , Category Definitions**
- 5. Processes for each Electronic Personnel Action Forms (EPAF), assigning additional Job assignments to Current Employees, and rehiring.**

## How to set up your Proxy (Electronic Approval Proxy Rule Screen – NTRPROX)

**Overview** – The Electronic Approval Proxy Rule Screen (NTRPROX) permits each approver to designate proxies or individuals authorized to take approval action in the absence of the approver for every level of approval in which they are defined.

Follow these steps to complete the process.

1. Access the Electronic Approval Proxy Rule Screen (NTRPROX)  
Your User ID will default in the User ID field.
2. Perform a Next Block function.
3. At the pop-up Alternate Logon Verification Form:  
Your Banner ID should appear. Enter your Oracle password
4. Click the Verify button (do not hit the return key).
5. Select the approval level you that want to assign a proxy by highlighting the correct record. Tip: there will be a faint arrow to the left of the selected field.
6. In the Proxy ID field type the proxy's Banner username ID and the proxy's name should appear in the Name field.
7. For Departmental Time Entry you need to CTR PG Down one more time.

Possible reasons for not working:

- The proxy's name could be Thomas, but they used Tom as their Banner ID. Check with your proxy for an accurate username ID.
- The proxy is using their middle name for their ID. Check with your proxy for an accurate username ID.

***If these processes do not work, the proxy has not been created or issued a Banner username ID. You will have to wait until this process is completed.***

Please Contact Network Computer Services. 797-2406.

## Electronic Approval Routing Rule Screen (NTRROUT)

The Electronic Approval Routing Rule Screen (NTRROUT) is an optional rule form that allows you to define levels of approval by approval category and assign names to these levels. This rule form becomes a customized rule form specific to the *User ID* and *approval category*. This means that a specific user has the ability to define and customize their own personal routing that only they can change, delete, or add to.

### Procedure:

1. Access the NTRROUT screen.
2. The User ID field will default based on your Oracle ID since you are the one that has accessed the Electronic Approval Routing Rule Form (NTRROUT).
3. Approval Category – Choose the category to set up your customized routing. For example: To set up customized routing for wage hourly employee hires, choose JB\_WH.
4. CTRL PG down (Next Block).

The assigned approval levels default with approval appropriate actions.

Type in the approver's user ID or search by clicking on the magnify glass icon. The search only brings up those names assigned to the level you have highlighted. You can navigate up and down by using the arrow keys.

5. Save, F10.

This process will set up your EPAF approval levels for each assigned category. Example: JB\_ (Job Assignment) the same approval levels will default in when you use this category.

## EPAF Approval Summary Screen (NOAAPSM)

### OVERVIEW

The purpose of this screen is to view information about an Electronic Approvals transaction and approve transactions. The form captures the data created on the Electronic Personnel Action Form (NOAEPAF) when it is being routed through the approval process. You may access the Electronic Approval Summary Form directly from the Main Menu by selecting Electronic Approvals or from the Electronic Personnel Action Form (NOAEPAF) by selecting *Electronic Approval Summary Form* from *Options*. You will also use this screen to take required action on an Electronic Approvals transaction such as, approving or disapproving a Personnel Action. You can query Electronic Approvals transactions based on your selections from the **Transaction Status** and **Queue Status** pull-down lists located on the top half of the form.

### HOW to USE NOAAPSM

1. Enter NOAAPSM in the navigation menu window.
2. Your user ID will populate.
3. Enter in range of dates to query.
4. Select Transaction Status
5. Select Queue Status
6. CTRL pg down
7. Verification window appears. Enter in your password.
8. CLICK Verify.
9. Summary form will populate according to the combination you made between Transaction Status and Queue Status.

### You have the option of viewing detailed information about the transaction by:

1. Selecting the Electronic Approval transaction from the summary view.
2. Go to *OPTIONS* from the navigation menu.
3. Select *PAF Detail Information*.
  - a. Note: This function will take you to the Electronic Personnel Action Form (NOAEPAF) where you can view the actual PAF and the contents of the transaction such as the actual current and new values represented in the action.

To view the Electronic Approvals routing information – Where the EPAF is being sent to for approvals

1. Select an Electronic Approval transaction in the summary view.
2. Select *OPTIONS*
3. Choose the *Queue/Routing information*.

To view comments regarding the EPAF

1. Select the Electronic Approval Transaction
2. Go to options
3. Select Transaction Comments

\*\*\*You can also select these options from NOAEPAF and selecting the options menu\*\*\*

**KEY BLOCK FIELDS (Top of NOAAPSM Screen)**

**User ID** – The first field and the key to the Electronic Approval Summary Form (NOAAPSM). This will default based on the User ID of the person that received the Electronic Approvals message(s) when logging onto the established session.

**Proxy For** – This field allows you to identify the person for whom you are acting when taking as a proxy. This field enables you to view the detail of transactions that you may need to approve in another person's absence.

**Submitted Date To & From:** These fields allow you to view submitted Electronic Approvals for a specified range of time.

**Transaction Status** – This field represents the ***CURRENT status of ALL the Electronic Approval transactions in Banner.***

**Transaction Status Definitions:**

- ◆ **Pending** – this transaction is pending upon an approver to take action. You can see where it is in the approval process by viewing the routing information.
- ◆ **Waiting** – the EPAF has not been submitted by the originator.
- ◆ **Approved** – the transaction has been approved and waiting to be applied.
- ◆ **Disapproved** – the transaction has been disapproved by an approver.  
***WARNING: Disapproved removes the transaction from the approval process and is removed from the system.***
- ◆ **Complete** – this transaction has been approved and applied. It has completed the approval process.
- ◆ **Partially Complete** – this transaction has only been partially applied. It is waiting on the applier to finish the process.
- ◆ **Void** – this transaction has been voided by the originator or superuser
- ◆ **Cancelled** – the transaction has been cancelled by the superuser.
- ◆ **Return for Correction** – the transaction has been sent back to the originator to make corrections. PLEASE insert comments to help the communication flow to the EPAF.
- ◆ **All** – this will query all transactions.

**Queue Status** field represents ***the status of where the transaction sits in relation to YOU as the Electronic Approvals user logged into Banner.*** The status will be used as a *query tool* which will enable you to query transactions in your queue by a combination of the individual queue status and the transaction status.

**Queue Status Definitions:**

- ◆ **Pending** – these transactions are pending upon YOU to take action before advancing through the approval process. ***WARNING: The EPAF cannot proceed without you taking action!!!***
- ◆ **FYI** – This is information for you only. No approval necessary.
- ◆ **Approved** – These transactions have been through the process and approved by you.
- ◆ **Disapproved** – these transactions were not approved by you and therefore are not advancing through the approval process.
  - ***WARNING: The transaction has stopped completely. The originator must submit a new EPAF.***
- ◆ **In the Queue** – the transaction is in the queue for you. The EPAF is located before your level of approval.

- ◆ **Void** – the transaction has been withdrawn and voided by the originator or a Superuser.
- ◆ **More Information** – You want to research the EPAF before taking action. It is stopped in the process until you take action.
- ◆ **Acknowledged** – A FYI transaction has been acknowledged by you.
- ◆ **Return/Correction** – The transaction has been requested by you for the originator to correct a mistake or make changes to the EPAF.
- ◆ **ALL** – Allows you to view all EPAFs in the queue for you.
- ◆ **None(originator)** – this brings up all the EPAFs originated by you.
- ◆ **None(superuser)** – allows a Superuser to see EPAFs they performed an action on. Superusers can only approve or void transactions.

**Note: Using Both Transaction and Queue Status** – The **Transaction Status** (*current status of EPAFS*) in conjunction with the **Queue Status** (*in relation to you*) allows the user to narrow down all electronic transactions in the system.

- **Example:** You want to query every transaction that is **Pending** action upon you. You would choose **ALL** in **TRANSACTION STATUS** and **Pending** in the **QUEUE STATUS**. You will see all EPAFS that are pending upon some action taken by you before moving forward in the system.

#### **TRANSACTION INFORMATION BLOCK FIELDS (Bottom of Screen)**

The Transaction Information block will query information based on the entries defined in the Key block. This block contains basic critical information about Electronic Approvals transactions. The records will be queried listing the lowest transaction number first. The block contains 15 informational fields and one action field. The informational fields are populated as a result of the Personnel Action (PAF) that was submitted to the approval queue. Below you will find a brief description of these fields.

**ID and Name** – Identify the individual affected by the change, that is, the person for whom the personnel action was created.

**Approval Category** – The Approval Category that the EPAF has been assigned.

Example: EE\_ for new employee hires.

**Transaction Information Window** – the following 12 fields are within this window are:

1. **Description Field** – describes the Approval Category.
2. **Queue Status** -- indicates where the transactions resides for you the approver and what status it is in the approval process (see Queue Status Definitions.)
3. **Required Action Indicator (Ind)** – This identifies the reasons a transaction is being sent to you as a person defined in the approval queue. It specifies the types of action you are expected to take on the transaction. There are three valid action types:
4. **Transaction Number** – is the number that has been assigned by the system to identify the Electronic Personnel Action (PAF). This is a one-up system generated number created when the PAF was submitted on NOAEPAF.
5. **Trans Created On** – This specifies the date when the originator (creator) submitted the specific transaction on the Electronic Personnel Action Form (NOAEPAF).
6. **Transaction Status** – This is the status of the transaction.
7. **Approved by ID** – This field displays the ID of the person that took action on the transaction.
8. **Activity Date** – This field defines when the last approver took action on the transaction. When you take action by changing the *Approver Action* field and you save the data, the Activity Date will default to the system date and cannot be

changed. The Activity Date can be used as a tracking tool to tell how long it takes for transactions to be approved.

9. **Submitted On** – This field reflects the date that the originator of the transaction submitted the transaction to the approval queue.
10. **Application Date** – This field represents the date that was entered during the application of a transaction for any changes to the Employee record (PEAEMPL). This Application Date will only be populated if you are querying transactions that are at a transaction status of *Complete* or *Partially Complete*.
11. **Applied to Database by** – This field represents the Oracle ID of the person who applied the database with regard to the specific transaction or Personnel Action (PAF).
12. **Originator ID** field will reflect the Oracle ID of the person who originated (created) the transaction or PAF.

**Approver Action** – This field is where you have the ability to execute or take action on Approval Summary Form (NOAAPSM). You simply need to identify the approver action that you want to take by using the pull down list in the data area. There are seven valid approver actions. They are as follows:

- **Approved** – You can approve the transaction indicating that you are in agreement with the information on the PAF.
- **Disapproved** – You can disapprove the transaction indicating that you disapprove the information on the PAF.
- **Void** -- Valid approver action for the **originator** of the transaction and the **superuser** only. This action indicates that the transaction has been voided and is no longer valid.
- **More Info** – You desire more information about the transaction prior to taking action. This status indicates to other people in the approval queue that the person is taking action to research the PAF.
- **Acknowledge** -- You have received the PAF in an FYI status and can acknowledge the transaction.
- **Return for Correction** – You can return a PAF to the **originator** of the transaction when an error is detected prior to the PAF being applied to the database
- **None** – Default value for the pull down list.

#### **To view comments regarding the EPAF**

1. Select the Electronic Approval Transaction in NOAAPSM or Type in the transaction number in NOAEPAF in the transaction number field.
2. Next block Function
3. Go to options
4. Select Transaction Comments

## Electronic Approvals for Job Assignments (JB\_)

Electronic Approval Categories are the Personnel Action Form Packet. Before you start an electronic approval process, ask yourself what are you trying to do? Are you assigning an overload assignment to a professor? Are you hiring a brand new employee that is not in the database? Do you have an employee that has a change? Ask yourself what is the process you want to perform and choose from the categories below.

**OVERVIEW: JB\_ → Job Assignment** – This category is for assigning job positions to existing employees or rehires. The person is listed as an employee in the database system. To search to see if the database has employee record, select the search icon in NOAEPAF and choose Employee Search.

The specific processes departments will use from this category are:

1. JB\_ADJ Job Assignment Adjunct – Assigning Adjunct assignment to *current benefited* employees
2. JB\_MGA Job Assignment GA Monthly Award– Assigning a Graduate Assistant Job to Employees or rehires
3. JB\_MWH Job Assignment Monthly Wage Hr. – Assigning Monthly payments or lump sum amounts to an Hourly employee
4. JB\_NP Job assignment No Pay Volunteers – Assigning No Pay Volunteer positions to already existing employees; this includes Emeritus Status
5. JB\_SAL Job Assignment Salaried FY – Assigning a job to an employee FY
6. JB\_TNB Job Assignment Teacher (w/o Benefits) – Assigning Monthly or lump sum amounts to Teacher/Lecturers *who do not receive benefits* and only teach on a semester to semester basis
7. JB\_WH Job Assignment Hr/Student – Assigning a Wage Hourly Job
8. JB\_SUM Job Assignment Summer Months Add on – Faculty who does research or teaching in the summer above their Academic Year assignment

**To view positions and general information within a department:**

1. Access NBIPORG
2. Enter in “DP” code for department, or search using the magnifying glass.
3. CTRL PG Down (Next Block)
4. Listed are the positions and FTE information

**To view the employee(s) in the position:**

1. Select the position number in NBIPORG
2. Click on the Select Icon (the big arrow) – Your screen will switch to the main screen of Banner.
3. Access NBIPINC

**DEFINITION of SUFFIX NUMBER** – The suffix field is used to allow the employee to have more than one job with the same position number. For example: if the employee has two assignments at the same time in the same department at differing rates, the suffix # is used to distinguish between the different rates of pay. You can only use a suffix number once. For example, if 01 is used, use 02 and so forth.

## **Job Assignment ADJUNCT (JB\_ADJ)**

**IMPORTANT:** When using this EPAF for Extra Contractual Service or Consulting Leave, please refer to and comply with Utah State University Policies 376 & 377. The form for these services is on the HR website.

### **IMPORTANT INFORMATION UPDATE:**

**1) When paying overtime or leave payouts please use PHATIME – Do not use this EPAF as payouts for these functions.**

**2) Definitions: *Overload position* is any additional assignment in the same department above the employee's primary assignment. *Secondary Assignment (Adjuncts)* is an additional assignment in an outside department.**

1. Access NOAEPAF and enter the employee's A-#
2. Query Date (The day you are generating the EPAF).
  - a. Note: The job effective date must be the query date or a date in the future. If you need to make the job effective date the first and you are generating the EPAF on the 5<sup>th</sup>, change your query date to the 1<sup>st</sup>.
3. Double-click the Approval Category field and select JB\_ADJ. Job Assignment Adjunct.
4. The Approval Type field is populated with JB\_A Adjunct/Overload/Contractual process. The transaction number and transaction status fields will be assigned by the system.
5. POSTION: Type in position # or search. Use Employee Class Code FO (Adjunct/Overload) and DPCODE in the search.
  - a. Please use appropriate position numbers listed below:
    - i. P01xxx for Adjunct/Overload (Instructional Overload)
    - ii. P09xxx for Non-Instructional Overloads NO is the Employee Class for Non-Instructional overload
6. Suffix:
  - a. 00 for new assignments.
  - b. 01, 02, 03...etc for additional adjunct assignments in the same department and position #.
7. CTRL PG DOWN – The screen switches to a verify screen with your user name.
8. Enter in your Login password and click on Verify to continue.

Fill in the following information in the New Values column: (To navigate use the up/down arrow keys↑↓). . Required Fields to submit the EPAF is marked with an asterisk (\*)

9. \*Job effective date (The first date of the pay period or when hired. The job effective date is the query date or a date in the future.) Remember Banner prorates so if you want the adjunct paid for a full month put the effective date at the 1<sup>st</sup> of the month.
10. Personnel date (This is the date something should have happened if different then the job effective date – Past or future dates.)
11. \*Job begin date (Same as Job Effective date.)
12. \*Contract Type – Defaults to O for "Overload" **defaults and can be changed.**
  - a. If the assignment is in another department use "S" for secondary.
  - b. Example: Professor Joe from the Math Department teaches pottery for the Art Department.
13. Title – Enter in a title for the position.
14. \*Base Salary – This is the amount the employee will be paid for the adjunct assignment. Example: \$4,000 for teaching a four month course on Marketing.
15. \*FTE – **Defaults to .25 and cannot be changed.**
16. \*Pays – Pays and Factor need to be the same number. This instructs Banner to pay the employee for that number of months. Example: If base salary = \$4,000,

- and Pays = 4 and Factor = 4, then the employee will receive \$1,000 for 4 pay periods. (text)
17. \*Factor must equal the Pays
  18. \*Job Location – Main (for main campus) defaults in. This can be changed to Continuing Ed if appropriate by clicking on the magnifying glass.
  19. \*Job Change Reason – Select on the Search Icon at the top of the column and choose an appropriate reason.
  20. \*Timesheet Org – Home department (EXAMPLE: DPMATH)
  21. F10 to SAVE
  22. Rollback and in approval type enter JB\_LBR and control page down. Verify FOAP information. The accounts must equal 100%. The Effective date is the same as the Job effective date in step # 9.
  23. Rollback and in approval type enter JC\_TRM and control page down. All dates in termination relate to the date the job assignment ends. Must fill in all three dates.
  24. \*Job effective date (The last day of the pay period of the job assignment.)
    - a. Banner will prorate the last payment if you make the termination date earlier than the last day of the pay period.
  25. \*Job end date (Same as job effective date in step # 24.)
  26. \*Personnel date (REQUIRED: The *actual last day* the employee worked in the job assignment.)
  27. \*Job Status –T (defaults for job assignment termination)
  28. \*Job Change Reason – A3 Termination of Adjunct/Overload assignment. Defaults and cannot be changed.
  29. \*Timesheet Org – Home department (EXAMPLE: DPMATH)
  30. Must Attach comments. Select Information/Comment Tab. Describe pertinent information in comment box. Add your telephone number so approvers can call if there are questions.

Save.

**When finished with the last type do not roll back. You are ready to send the EPAF by following these steps:**

1. Select *OPTIONS*
2. Choose *Routing Information* (A new window will appear)
3. Fill in the Approvers by typing in their username or select from the magnify glass to conduct a search.
4. SAVE
5. Select Options
6. Choose Submit Transaction

### **Job Assignment Graduate Student (JB\_MGA)**

***A graduate assistant should be classified as a GI (Graduate Instructor), GTA (Graduate Teaching Assistant), or GRA (Graduate Research Assistant), with a graduate assistant who has both teaching and research assignments classified in the position that will occupy a majority of his/her time. The GGA (General Graduate Assistant) category should be used for multiple assignments only when it is not possible to identify the predominant assignment or it will change from semester to semester. (Reference: USU Graduate Assistant Positions Approved by the Graduate Council 10/15/1999).***

### This EPAF is to set up monthly payments and track encumbrance for Graduate Assistants.

1. Access NOAEPAF and enter the employee's A-#
2. Query Date (The day you are generating the EPAF).
  - a. Note: The job effective date must be the query date or a date in the future. If you need to make the job effective date the first and you are generating the EPAF on the 5<sup>th</sup>, change your query date to the 1<sup>st</sup>.
3. Double-click the Approval Category field and select JB\_ MGA.
4. The Approval Type field is populated with JB\_GAP Graduate Assistant Pay process. The transaction number and transaction status fields will be assigned by the system.
5. POSTION: Type in position # P03XXX for graduate assistant employees (XXX is the department's number, i.e., P03068 is for the math department).
6. Suffix:
  - a. 00 for new assignments.
  - b. 01, 02, 03...etc for additional adjunct assignments in the same department and position #.
7. CTRL PG DOWN – The screen switches to a verify screen with your user name.
8. Enter in your Login password and click on Verify to continue.

Fill in the following information in the New Values column: (To navigate use the up/down arrow keys). Required Fields to submit the EPAF is marked with an asterisk (\*)

\*Job effective date (The first date of the pay period or when hired. The job effective date is the query date or a date in the future.)

9. Personnel date (This is the date something should have happened if different then the job effective date – Past or future dates.)
10. \*Job begin date (Same as Job Effective date in step #7.)
11. \*Contract Type (Defaults to P for a rehire but can be changed to S for secondary job assignment.)
12. \*Title \*\*\***Please Designate the correct Graduate Assistant Title by typing it out (i.e., Graduate Instructor) – See Text Box at top of page**\*\*\*
13. \*Base Salary (The **Total Financial Award Amount** or the **amount the Graduate Assistant will receive for the term of employment.**)
14. \*Timesheet Org – Home department (Example: DPMATH)
15. \*F10 to Save
16. Rollback and in approval type select JB\_GAM
17. CTRL PG Down
18. \*Job Effective date: the same as in step # 9
  
19. \*FTE – defaults to **.5 and can be changed to .25** (NOTE: In Banner, the FTE does not change the award amount or monthly payment.)
20. \*Hours per pay: **1 defaults and cannot be changed.**
21. \*Hourly/Monthly rate – Enter in the amount that the GA will receive per month. Take the Base and divide by the # of months.
22. \*Pays
23. \*Factor – NOTE: Pays and factors are the **number of months of payment and are the same number.**

**IMPORTANT:** Base is the total amount of the Award for the semester/term of employment. Monthly is the amount paid per month; Pays and factor are the # of months in the term of employment. (**Example:** Base = \$8000; Monthly rate = \$2000; pays and factor = 4.)

24. \*Job Change Reason: Defaults to E2 (Rehire) and cannot be changed.

- a) Timesheet Orgn – Home department (Example: DPMATH)
25. \*F10 to Save
26. Rollback and in approval type enter JB\_LBR and control page down. Verify FOAP information. The accounts must equal 100%. The Effective date is the same as the Job effective date in step # 7.
27. SAVE – F10 or use the “save” icon and rollback.
28. In Approval Type field choose JC\_TRM Assignment Termination Process. And CTRL PG down. **All dates in Termination piece of EPAF refer to when the Assistantship assignment will end.**
29. \*Job effective date (The last day of the pay period of the job assignment)
  - a) Note: Banner prorates the last payment if the termination date is before the last day of the pay cycle.
30. \*Job end date (Same as Job effective date in #29).
31. \*Personnel date (REQUIRED: The actual last day the employee worked in the job assignment)
32. \*Job Status– defaults to T for job termination
33. \*Job Change Reason – A5 (GA Job Change) **defaults and cannot be changed.**
34. \*Timesheet Org – Home department (Example: DPMATH)
35. SAVE – F10 or use the “save” icon

**When finished with the last type do not roll back. You are ready to send the EPAF by following these steps:**

1. Select *OPTIONS*
2. Choose *Routing Information* (A new window will appear)
3. Fill in the Approvers by typing in their username or select from the magnify glass to conduct a search.
4. SAVE
5. Select Transaction Comments and explain what you are doing with this EPAF. Add your telephone number so approvers can call if there are questions.
6. Save
7. Select Options
8. Choose Submit Transaction

### **IMPORTANT INFORMATION**

- 1) If the Grad Assistant changes departments, or quits before the effective date of termination set up in this EPAF, then the department needs to notify the Graduate School and the Human Resource Office. The change could affect the Graduate Assistant’s Financial Aid. The new Department must submit a new EPAF (JB\_MGA) to hire them in that department.
- 2) If the term of employment carries over into the new fiscal year, the departments need to terminate the assignment on June 30<sup>th</sup> and submit a second EPAF reassigning the position effective July 1<sup>st</sup>.
- 3) To increase the monthly payment, the department needs to access PHATIME and change “1” to 1.xx to increase the amount (i.e., 15% increase would be reflected in PHATIME as 1.15). If the amount is decreased, i.e. by 25%, change 1

to .75 in PHATIME. IF the employee does not get paid for a month (January for example), simply do not submit the timesheet for the employee.

## **Job Assignment Wage Hourly Monthly Payment (JB\_MWH)**

**This EPAF is for an employee wage hourly paid on a set monthly amount for payroll (Excluding employees teaching a class).**

1. Access NOAEPAF and enter the employee's A-#
2. Query Date (The day you are generating the EPAF).
  - b. Note: The job effective date must be the query date or a date in the future. If you need to make the job effective date the first and you are generating the EPAF on the 5<sup>th</sup>, change your query date to the 1<sup>st</sup>.
3. Double-click the Approval Category field and select JB\_MWH Job Assignment Monthly Wage Hourly.
4. The Approval Type field is populated with JB\_H hourly job process. The transaction number and transaction status fields will be assigned by the system.
5. POSTION: Type in position # P05XXX (XXX are the department's last three numbers, i.e. P05068 is Math)
6. Suffix:
  - c. 00 for new assignments.
  - d. 01, 02, 03...etc for additional adjunct assignments in the same department and position #.
7. CTRL PG DOWN – The screen switches to a verify screen with your user name.
8. Enter in your Login password and click on Verify to continue.

Fill in the following information in the New Values column: (To navigate use the up/down arrow keys↑↓). Required Fields to submit the EPAF is marked with an asterisk (\*).

9. \*Job effective date (The first day of the pay period or when hired. The job effective date is the query date or a date in the future.)
10. Personnel date (This is the date something should have happened if different then the job effective date – Past or future dates)
11. \*Job begin date (Same as Job Effective date)
12. \*Contract Type – P is defaulted and can be changed to "S" for secondary if the student has another job assignment.
13. Title Enter in the advertisement number

**\*\*\*\*Student Employment requests that ALL advertising numbers for On Campus positions are entered in the TITLE field. Student Employment will not approve if advertisement numbers are not entered. \*\*\*\***

14. \*Hourly/Monthly rate – Enter in the monthly amount or the "Lump sum" monthly payment.
15. \*Job Location – Main (for main campus) defaults in. This can be changed to Continuing Ed if appropriate by clicking on the magnifying glass.
16. \*Job Change Reason – E2 defaults for rehire and can be changed.
17. \*Timesheet Org – Home department (Example: DPMATH)
18. F10 to SAVE
19. Click on the "Roll back" Icon

20. In Approval Type field choose JB\_MWH Monthly Pay Wage Hourly.
21. CTRL PG Down
22. \*Jobs Effective Date: Same date as used in JB\_H step #9
23. \*Regular Rate: Enter in the monthly payment or lump sum (Same as in step #14)
24. \*Pays and Factor – Defaults to 1 and cannot be changed.
25. \*Hours per Pay: Defaults to 1 and cannot be changed. This signifies a monthly payment to payroll
26. \*Timesheet Orgn: Enter the Home department “DP” CODE (i.e., DPJCOM).
27. SAVE – F10 or use the “save” icon
28. Click on the “Roll back” Icon
29. SAVE – F10 or use the “save” icon
30. Rollback and in approval type choose P\_LABR and control page down. Verify FOAP information. The accounts must equal 100%. The Effective date is the same as the Job effective date in step # 9.
31. In Approval Type field choose P\_EARN Default Earnings Process
32. CTRL PG Down
33. \*Effective Date: same as Jobs Effective Date used in JB\_H
34. \*Enter HRL in next field/column under Earnings Code.
35. \*Enter 1 under HRS/Units.
36. **DO NOT ENTER ANYTHING IN THE REMAINING FIELDS.**
37. SAVE – F10 or use the “save” icon.
38. In Approval Type field choose JC\_TRM Assignment Termination Process  
**Termination dates refer to dates the job assignment ends. Remember Banner prorates so if you want it to pay a full month put the last day of the month for the job to end.**
39. CTRL PG Down
40. \*Job effective date (The last day of the pay period of the job assignment)
  - Note: Banner prorates the last payment if the termination date is before the last day of the pay cycle.
41. \*Job end date The date of the job termination – remember Banner prorates
42. \*Personnel date (REQUIRED: The *actual last day* the employee worked in the job assignment)
43. \*Job Status– defaults to T for job termination
44. \*Job Change Reason – A6 (Termination of WH) defaults and cannot be changed.
45. \*Timesheet Org – Home department (Example: DPMATH)
46. SAVE – F10 or use the “save” icon

**When finished with the last type do not roll back. You are ready to send the EPAF by following these steps:**

1. Select *OPTIONS*
2. Choose *Routing Information* (A new window will appear)
3. Fill in the Approvers by typing in their username or select from the magnify glass to conduct a search.
4. SAVE
5. Select Transaction Comments and tell the approvers what you are doing with this EPAF. Add your telephone number so approvers can call if there are questions.
  - a.
6. Save
7. Select Options

8. Choose Submit Transaction

## **Job Assignment No Pay/Volunteer (JB\_NP)**

**This EPAF is used for all people who Volunteer and receive NO PAY. This includes all emeriti, adjuncts for dissertations, and all other positions with no pay or for secondary titles, i.e. CE Research Instructor, etc. The appropriate position number to use is P08XXX.**

1. Access NOAEPAF and enter the employee's A-#
2. Query Date (The day you are generating the EPAF).
  - a. Note: The job effective date must be the query date or a date in the future. If you need to make the job effective date the first and you are generating the EPAF on the 5<sup>th</sup>, change your query date to the 1<sup>st</sup>.
3. Double-click the Approval Category field and select JB\_NP Job assignment No Pay/Volunteers. Note: The Approval Type field populates with JB\_H hourly job process
4. POSTION: Enter in the Department's P08XXX number.
5. Suffix: 00
6. Note: The Transaction Number and Transaction Status fields will be assigned by the system
7. CTRL PG DOWN
8. The screen switches to a verify screen with your user name. Enter in your login password and click on Verify to continue.

Fill in the following information in the New Values column: (To navigate use the up/down arrow keys↑↓). Required Fields to submit the EPAF are marked with an asterisk (\*).

9. \*Job effective date (The first day of the pay period or when hired)
10. Personnel date (This is the date something should have happened if different then the job effective date – Past or future dates)
11. \*Job begin date (Same as Job Effective date)
12. \*Contract Type (P for primary is defaulted into this field)
13. Title – Enter in the title of the position
14. \*Base Salary –0 defaults for no pay and cannot be changed.
15. \*FTE – Defaults to .25
16. Appointment percent defaults to 25
17. \*Job Location – Main (for main campus) defaults in. This can be changed to Continuing Ed if appropriate by clicking on the magnifying glass.
18. \*Job Change Reason – Select the appropriate choice by clicking on the search Icon at the top of the column.
19. \*Timesheet Org – Home department (DPCODE)
20. F10 to SAVE

**When finished with the last type do not roll back. You are ready to send the EPAF by following these steps:**

1. Select *OPTIONS*

Choose *Routing Information* (A new window will appear) **SPECIAL ROUTING**

**INSTRUCTIONS for NO PAY ADJUNCTS & EMERITI:**

**Please Insert EXEC Level (50) in the routing. To do this, arrow down under level code for new field and type in EXEC, then tab over and select Provost Office. Finally, hit save.**

2. Fill in the Approvers by typing in their username or select from the magnify glass to conduct a search.
3. SAVE
4. Select Transaction Comments tell the approvers what you are doing with this EPAF. Add your telephone number so approvers can call if there are questions.
  - a.
5. Save
6. Select Options
7. Choose Submit Transaction

**Job Assignment Salaried Fiscal Year (JB\_SAL)**

**This EPAF is used for employees that are being assigned a salary fiscal year position.**

1. Access NOAEPAF and enter the employee's A-#
  2. Query Date (The day you are generating the EPAF).
    - e. Note: The job effective date must be the query date or a date in the future. If you need to make the job effective date the first and you are generating the EPAF on the 5<sup>th</sup>, change your query date to the 1<sup>st</sup>.  
**Remember Banner always prorates so if you want the employee paid for the entire month the EPAF must have the 1<sup>st</sup> of the month.**
  3. Double-click the Approval Category field and select JB\_SAL.
  4. The Approval Type field is populated with JB\_S Salary Job process. The transaction number and transaction status fields will be assigned by the system.
  5. Enter position number
  6. Suffix:
    - f. 00 for new assignments.
  7. CTRL PG DOWN – or Next Block icon. The screen switches to a verify screen with your user name.
  8. Enter in your Login password and click on Verify to continue.
- Fill in the following information in the New Values column: (To navigate use the up/down arrow keys↑↓). Required Fields to submit the EPAF is marked with an asterisk (\*)
9. \*Job effective date (The first day of the pay period or when hired. The job effective date is the query date or a date in the future.)

10. Personnel date (This is the date something should have happened if different then the job effective date – Past or future dates)
11. \*Job begin date (Same as Job Effective date #9 )
12. \*Contract Type P defaults and can be changed. **Always P for new hires, can be changed to S for Secondary**
13. Title – Enter in the title of the position
14. FTE – (Full Time Equivalent – .75 to 1 is FT Benefited; Does not affect salary)
15. \*Appointment Percent – Enter in the Appointment % for the position, this affects the salary amount.
16. \*Base Salary – **the monthly amount that the employee will be paid times 12. For Example: Jane will get paid \$3000 per month, her Base Salary is \$3000 X 12 = \$36000**
17. \*Job Location – Main (for main campus) defaults in. This can be changed to Continuing Ed if appropriate by clicking on the magnifying glass.
18. \*Job Change Reason – choose the appropriate choice by selecting the search icon at the top of the column.
19. \*Timesheet Org – Home department (EXAMPLE: DPMATH)
20. F10 to SAVE
21. Rollback and in approval type enter JB\_LBR and control page down. Verify FOAP information. The accounts must equal 100%. The Effective date is the same as the Job effective date in step # 9.

**When finished with the last type do not roll back. You are ready to send the EPAF by following these steps:**

1. Select *OPTIONS*
2. Choose *Routing Information* (A new window will appear)
3. Fill in the Approvers by typing in their username or select from the magnify glass to conduct a search.
4. SAVE
  - a. **Select Information and Comments Tab Comments and tell the approvers what you are doing with this EPAF.** Put your phone number in case approvers have questions.
5. Save
6. Select Options
7. Choose Submit Transaction

### **Job Assignment AY Add On / Summer Months (JB\_SUM)**

**IMPORTANT NOTE: This EPAF is effective June 26, 2006.**

**EFFORT DESCRIPTION****AY Add-on/Summer P02xxx – Use JB\_SUM**

Up to 3 months of effort **within** the regular scope of the contract position that is in addition to the regular AY(Academic Year) assignment and can include teaching, research and administrative duties.

**Overload: Either P01xxx for teaching, or P09xxx for non teaching – Use JB\_ADJ**

Effort that is **outside** of the regular scope of the contract position or is additional effort beyond the 3 months AY Add-on/Summer

1. Access NOAEPAF and enter the employee's A-#
2. Query Date: This is the first day of the month.
3. Double-click the Approval Category field and select JB\_SUM. (Job Assignment AY Add On/Summer Months). The Approval Type field is populated with JB\_SUM. The transaction number and transaction status fields will be assigned by the system after you save and complete this first page.
4. POSITION: Type in position # or search. **Remember! For JB\_SUM EPAF Use Position # P02xxx only.** When searching for position number, use Employee Class Code **SM** and your DP Code.
5. SUFFIX:00 for new assignments. 01, 02, 03...etc for additional AY Add On/Summer Months assignments.
6. CTRL PG DOWN – or select NEXT BLOCK icon from menu screen. The screen switches to a verify screen with your user name. Enter in your Login password and click on Verify to continue.
7. Fill in the following information in the New Values column: (To navigate use the up/down arrow keys↑↓.) Required fields to submit the EPAF are marked with an asterisk (\*)
8. \*Job effective date is the first day of the month. **Remember otherwise Banner will prorate based on dates.**
9. Personnel date (This is the date the employee actually started the work if different than the job effective date – Past or future dates. This is an information only date and can be different from the query and job effective dates.)
10. \*Job begin date must be the same as Job effective date.
11. \*Contract Type – Defaults to S for secondary for JB\_SUM EPAF.
12. \*Title: \_\_\_ Insert number of months for this EPAF OF \_\_\_insert total of months to date up to three months.

**Example:**

**1st EPAF: .15 of .15 summer months**

**2nd EPAF: 1 of 1.15 summer months**

**3rd EPAF: .85 of 2 summer months**

13. \*Base Salary – Enter in the amount the employee will be paid. Monthly payment x 12
  - Calculation:
    1. AY base / 9 = 1 month summer
    2. # of summer months \* 1 month summer = summer amount to be paid
    - 3a. summer amount to be paid / 1 month summer = # of summer months
    - b. summer amount to be paid / # of payment months = monthly payment
    4. monthly payment \* 12 = base salary on EPAF

**Example:**

1. AY base of \$36,000 / 9 = 1 month summer of \$4,000
2. 1 month summer to be paid = \$4,000
3. \$4,000 / # of payment months of Jul-Aug or 2 = monthly payment of \$2,000
4. monthly payment of \$2,000 \* 12 = base salary on EPAF of \$24,000

14. Job Change Reason – This will default to ES
15. \*Timesheet Org – Home department (EXAMPLE: DPMATH)
16. F10 to SAVE or select save icon from top horizontal menu
17. Rollback and in approval type select JB\_LBR. Ctrl Page Down or Next Block icon. *Verify FOAP information. The account code will always be 616500 for this EPAF. The accounts must equal 100%. The Effective date is the same as the query date and Job effective date.*
18. SAVE
19. Rollback and in approval type select JC\_TRM then Ctrl Page Down or Next Block icon.
20. \*Job effective date is the last day of the month of the job assignment.  
**Banner will prorate the last payment if you make the termination date earlier than the last day of the pay period.**
21. \*Job end date (Again, last day of the pay period of the job assignment.)
22. \*Personnel date (This is the date the employee actually ended the work if different than the job termination effective date – Past or future dates. This is an information only date and can be different from the job effective and job end dates.)
23. \*Job Status –T (defaults for job assignment termination)
24. \*Job Change Reason – TC defaults and cannot be changed.
25. \*Timesheet Org – Home department (EXAMPLE: DPMATH)

**When finished with the last type do not roll back. You are ready to send the EPAF by following these steps:**

26. Choose *Routing Information Tab* (A new window will appear) Fill in the Approvers by typing in their username or select from the drop down arrow to conduct a search.
27. SAVE
28. Select *Transaction Comments Tab* – Enter the following information in the text box: Detailed information for originators record keeping and for Approvers and Appliers. Don't assume everyone knows what you mean. Add your telephone number so approvers can call if there are questions.

**Comment Template:**

Base Salary: **Full time AY base salary**.

Adding **# for this EPAF** of Summer Months at \$ **amount for this EPAF**

For Effort Performed From **start date** To **end date**

To be Paid From **start date** To **end date**

For a Grand Total of **total # including this EPAF** Summer Months

At \$ **total amount including this EPAF**

**Example:**

**Adding 1 summer month at \$5,000  
for effort performed from Jul-06 to Aug-06  
to be paid from Jul-06 to Jun-07  
for a grand total of 3 summer months at \$15,000**

29. SAVE

30. Select Options from top horizontal Menu. Choose Submit Transaction.  
If EPAF has no errors, message at bottom of screen will read: ***Transaction submitted.***

### **Job Assignment Adjunct Teaching w/o Benefits (JB\_TNB)**

**IMPORTANT INFORMATION: This EPAF is to hire employees that are assigned an adjunct teaching position and are not benefit eligible.**

**Example: The employee is only teaching on a semester to semester basis and is not benefited faculty. The position # for this EPAF is the department's P05XXX number.**

1. Access NOAEPAF and enter the employee's A-#
2. Query Date (The day you are generating the EPAF).
  - a. Note: The job effective date must be the query date or a date in the future. If you need to make the job effective date the first and you are generating the EPAF on the 5<sup>th</sup>, change your query date to the 1<sup>st</sup>.
3. Double-click the Approval Category field and select JB\_TNB.
4. The Approval Type field is populated with JB\_H Hourly Job process. The transaction number and transaction status fields will be assigned by the system.
5. POSTION: Type in position # P05XXX (XXX are the department's last three numbers, i.e. P05068 is Math)
6. Suffix:
  - a. 00 for new assignments.
  - b. 01, 02, 03...etc for additional adjunct assignments in the same department and position #.
7. CTRL PG DOWN – The screen switches to a verify screen with your user name.
8. Enter in your Login password and click on Verify to continue.

Fill in the following information in the New Values column: (To navigate use the up/down arrow keys↑↓). Required Fields to submit the EPAF is marked with an asterisk (\*)

9. \*Job effective date (The first day of the pay period or when hired. The job effective date is the query date or a date in the future.)

10. Personnel date (This is the date something should have happened if different then the job effective date – Past or future dates)
11. \*Job begin date (Same as Job Effective date)
12. \*Contract Type – P is defaulted and **can be changed**
13. Title – Enter in the title pf the position.
14. \*Hourly/Monthly rate – Enter in the amount the employee will be paid on a monthly basis or the “Lump Sum”/disbursement monthly amount as agreed. (i.e., \$1500 in February and April – Enter 1500).
15. \*Job Location – Main (for main campus) defaults and **can be changed.**
16. \*Job Change Reason – choose appropriate reason by selecting the search icon at the top of the column.
17. \*Timesheet Org – Home department (Example: DPMATH)
18. F10 to SAVE
19. Click on the “Roll back” Icon
20. In Approval Type field choose JC\_MWH Monthly Pay Wage Hourly.
21. CTRL PG Down (Next Block)
22. \*Jobs Effective Date: Same date as used in JB\_H step #9
23. \*Hourly/Monthly rate: **Same amount as in step #14**
24. \*Pays and Factor – Defaults to 1 **and cannot be changed.**
25. \*Hours per Pay: Defaults to 1 **and cannot be changed.**
26. \*Timesheet Orgn: Enter the Home department “DP” CODE (i.e., DPJCOM).
27. SAVE – F10 or use the “save” icon
28. Click on the “Roll back” Icon
29. SAVE – F10 or use the “save” icon
30. Rollback and in approval type choose P\_LABR and control page down. Verify FOAP information. The accounts must equal 100%. The Effective date is the same as the Job effective date in step # 9.
31. In Approval Type field choose P\_EARN Default Earnings Process
32. CTRL PG Down (Next Block)
33. \*Effective Date: same as Jobs Effective Date used in JB\_H (step #9).
34. \*Enter HRL in next field/column under Earnings Code.
35. \*Enter 1 under HRS/Units.
36. **DO NOT ENTER ANYTHING IN THE REMAINING FIELDS.**
37. SAVE – F10 or use the “save” icon.
38. In Approval Type field choose JC\_TRM Assignment Termination Process **Dates in termination process refer to when the job assignment will end. Remember Banner prorates pay so if you want the employee paid for a whole month put in the end date the last day of the month.**
39. \*Job effective date (The last day of the pay period of the job assignment)
  - a. Note: Banner prorates the last payment if the termination date is before the last day of the pay cycle.
40. \*Job end date (Same as Job effective date in #39).
41. \*Personnel date (REQUIRED: The *actual last day* the employee worked in the job assignment)
42. \*Job Status– defaults to T for job termination
43. \*Job Change Reason – A3 (Termination of Adjunct) defaults and cannot be changed.
44. \*Timesheet Org – Home department (EXAMPLE: DPMATH)
45. SAVE – F10 or use the “save” icon

**When finished with the last type do not roll back. You are ready to send the EPAF by following these steps:**

1. Select *OPTIONS*
2. Choose *Routing Information* (A new window will appear)
3. Fill in the Approvers by typing in their username or select from the magnify glass to conduct a search.
4. SAVE
5. Select Transaction Comments and explain what you are doing with this EPAF. Add your telephone number so approvers can call if there are questions.
  - a.
6. Save
7. Select Options
8. Choose Submit Transaction

## **Job Assignment Wage Hourly/College Work Study (JB\_WH)**

**IMPORTANT: This EPAF is used to assign an hourly rate to an already existing employee. Specifically, employees that are wage hourly or college work study. Please indicate the appropriate Employee Class Code (WH or WS) and follow Instructions from Student Employment Office in the text boxes at the appropriate steps.**

1. Access NOAEPAF and enter the employee's A-#
2. Query Date (The day you are generating the EPAF).
  - c. Note: The job effective date must be the query date or a date in the future. If you need to make the job effective date the first and you are generating the EPAF on the 5<sup>th</sup>, change your query date to the 1<sup>st</sup>.
3. Double-click the Approval Category field and select JB\_WH.
4. The Approval Type field is populated with JB\_H Hourly Job process. The transaction number and transaction status fields will be assigned by the system.
5. POSITION: Type in position # P05XXX (XXX are the department's last three numbers, i.e. P05068 is Math) **Use P04xxx if hiring a Work Study Student WS**
6. Suffix:
  - d. 00 for new assignments.
  - e. 01, 02, 03...etc for additional adjunct assignments in the same department and position #.
7. CTRL PG DOWN – The screen switches to a verify screen with your user name.
8. Enter in your Login password and click on Verify to continue.

Fill in the following information in the New Values column: (To navigate use the up/down arrow keys↑↓). Required Fields to submit the EPAF is marked with an asterisk (\*)

9. \*Job effective date (The first date of the pay period or when hired. The job effective date is the query date or a date in the future.)
10. Personnel date (This is the date something should have happened if different then the job effective date – Past or future dates.)
11. \*Job begin date (Same as Job Effective date.)
12. \*Contract Type (Defaults to P for a rehire but can be changed to S for secondary job assignment.)
13. Title Enter in the advertisement number for the position.

**\*\*\*\*Student Employment requests that ALL advertising numbers for College Work Study and On Campus positions be placed in the title field. Student Employment will not approve if advertisement numbers are not entered. \*\*\*\***

14. Hourly/Monthly rate – Enter in the Hourly rate.
15. \*Job Location – Main (for main campus) defaults and can be changed.
16. \*Job Change Reason – E2 for rehire and can be changed.
17. Timesheet Org – Home department (Example: DPMATH)
18. F10 to SAVE
19. Rollback and in approval type enter JB\_LBR and control page down. Verify FOAP information. The accounts must equal 100%. The Effective date is the same as the Job effective date in step #9.

**When finished with the last type do not roll back. You are ready to send the EPAF by following these steps:**

1. Select *OPTIONS*
2. Choose *Routing Information* (A new window will appear)
3. Fill in the Approvers by typing in their username or select from the magnify glass to conduct a search.
4. SAVE
  - a. Select Transaction Comments and explain what you are doing with this epaf.
5. Save
6. Select Options
7. Choose Submit Transaction

**\*\*\*\*\*Student Employment requests that for College Work Study positions, departments are to send the EPAF through with no changes to the Labor Distribution Screen.**

**To view comments regarding the EPAF**

1. Select the Electronic Approval Transaction in NOAAPSM or Type in the transaction number in NOAEPAF in the transaction number field.
2. Next block Function
3. Go to options
4. Select Transaction Comments and explain what you are doing in this EPAF. Add your telephone number so approvers can call if there are questions.